2/15/81 C 3400-1:2-2

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Market Research Division
Fairchild Publications, New York

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TABLE OF CONTENTS

	Page
AT THE MANUFACTURER LEVEL:	
MARKET TRENDS	1
GENERAL STATISTICS ON THE INDUSTRY	2
LOCATION OF THE INDUSTRY	4
EMPLOYMENT & EARNINGS	5
CONCENTRATION IN THE INDUSTRY	5
MANUFACTURER OPERATING RATIOS	7
MANUFACTURER OPERATIONS	8
SHIPMENTS	9
MATERIALS CONSUMED IN PRODUCTION OF FLOOR COVERINGS	11
PRODUCER PRICE TRENDS	13
FOREIGN TRADE — IMPORTS	14
FOREIGN TRADE — EXPORTS	17
AT THE WHOLESALER LEVEL:	
DISTRIBUTORS	19
THE CONTRACT MARKET	20
AT THE RETAIL LEVEL:	
THE POTENTIAL MARKET	21
CONSUMER EXPENDITURES	23
RETAIL SALES BY STORE TYPE	23
FLOOR COVERINGS SPECIALTY STORES	25
FURNITURE/HOME FURNISHINGS STORES	29
DEPARTMENT STORES	31
RETAIL ADVERTISING	34
CONSUMER BUYING HABITS	34
SCHEDULE OF ADDITIONAL FACT FILES	39

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Standard Book Number 87005-354-X

Printed in the United States of America

GENERAL STATISTICS ON THE INDUSTRY

SOFT SURFACE FLOOR COVERINGS

Market Trends

The 1980 recession in the U.S. has had a negative effect on the carpet and rug industry. U.S. Census Bureau statistics for the first half of the year show carpet and rug shipments by U.S. manufacturers down 4.6% compared with the first six months of 1979, although the dollar value of shipments rose 1%. Tufted carpets and rugs, which account for 95% of all carpet and rug constructions, were down 5.0% in quantity of shipments.

The housing industry has been one of the hardest hit areas in the recession, and its troubles reflect directly on the carpet and rug industry. Because of high mortgage rates and tight credit restrictions, new housing construction and sales of both old and new homes have suffered. Trade sources indicate that these activities account for approximately 55% of carpet sales. Sales of new one-family homes during July 1980 were estimated at a seasonally adjusted annual rate 14% below July 1979. Housing starts were estimated to be 1.2 million for 1980 versus 1.7 million starts in 1979.

While the industry faced domestic problems, the international market for U.S.-made carpets and rugs continued to grow. The Carpet and Rug Institute (CRI) expects exports to exceed $300 million in value for the first time in 1980, after two consecutive years of 40% growth in shipments value. Mass production techniques which enable U.S. manufacturers to produce carpets and rugs cheaply, the lack of carpet variety overseas and the favorable rate of currency exchange are explanations for the rapid rise in exports.

In the U.S., once the recession is over, carpet and rug manufacturers look for good economic and social conditions to contribute to an estimated 22% increase in carpet and rug shipments through 1984. The steady increase in the number of households in the U.S., combined with the rapid rise of adults in the 25-54 year old age bracket (the prime household-building years), will contribute mightily to the rejuvenation of the industry from its current doldrums.

The commercial contract market also holds promise for the industry in the years to come. While this market held an 18-20% share of the total broadloom market in 1977, the CRI predicts it will hold a 23-25% share by the end of 1980. At the same time, the residential contact market is expected to decline slightly from a 20-22% share in 1977 to 19-21% in 1980. Much of the growth in the commercial contract market will come from new construction, rather than replacement sales.

Meanwhile, the popularity of carpets and rugs for home use continues due to ease of care and maintenance and their solid-resistant, acoustical and energy-saving qualities. Recent surveys indicate that 74% of all living rooms in the U.S. now have wall-to-wall carpeting and only 3% have no carpet or rug in this room.

GENERAL STATISTICS ON THE INDUSTRY

AT THE MANUFACTURER LEVEL

The latest detailed information on the soft surface floor coverings industry at the manufacturer level has been released by the U.S. Bureau of the Census in the 1977 Census of Manufactures. This is the first complete census since 1972.

The soft surface floor coverings industry, as classified into the three SIC groupings below, consisted of 540 companies which operated 592 mills in 1977. The value of industry shipments from these establishments was $4.8 billion in 1977, 51.8% higher than in the 1972 Census of Manufactures. Value added by manufacture amounted to $1.530 billion in 1977, up 42.4% from $1.076 billion in 1972.

Woven Carpets and Rugs (SIC 2271)*

	1977	1972	% Change 1977/1972
Number of companies	71	64	+ 10.9%
Number of establishments**	71	64	+ 10.9
With 20 or more employees	16	18	- 11.1
Total employment (thous.)	2.8	6.5	- 56.9
Production workers (thous.)	2.5	5.6	- 55.4
Payroll (mil. $)	$ 24.8	$ 44.5	- 44.3
Value added by manufacture (mil. $)#	$ 47.1	$ 93.2	- 49.5
Value of shipments (mil. $)##	$138.7	$212.3	- 34.7
Capital expenditures, new (mil. $)	$ 1.1	$ 3.2	- 65.6

Tufted Carpets & Rugs (SIC 2272)*

	1977	1972	% Change 1977/1972
Number of companies	397	333	+ 19.2%
Number of establishments**	449	381	+ 17.8
With 20 or more employees	251	236	+ 6.4
Total employment (thous.)	50.2	50.1	+ 0.2
Production workers (thous.)	39.4	40.3	- 2.2
Payroll (mil. $)	$ 506.5	$ 348.0	+ 45.5
Value added by manufacture (mil. $)#	$1,438.2	$ 926.8	+ 55.2
Value of shipments (mil. $)##	$4,520.7	$2,775.2	+ 62.9
Capital expenditures, new (mil. $)	$ 78.7	$ 67.1	+ 17.3

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Carpets and Rugs, Not Elsewhere Classified
(SIC 2279)*

	1977	1972	% Change 1977/1972
Number of companies	72	79	- 8.9%
Number of establishments**	72	83	- 13.2
With 20 or more employees	18	26	- 30.8
Total employment (thous.)	2.8	3.2	- 12.5
Production workers (thous.)	2.4	2.5	- 4.0
Payroll (mil. $)	$ 25.3	$ 22.7	+ 11.4
Value added by manufacture (mil. $)#	$ 44.8	$ 56.0	- 20.0
Value of shipments (mil. $)##	$115.2	$157.9	- 27.0
Capital expenditures, new (mil. $)	$ 2.6	$ 4.3	- 39.5

na = not available
n.e.c. - not elsewhere classified

*Manufacturers are classified by industry under the Standard Industrial Classification (SIC) system determined by the principal product made, as shown below.

SIC 2271 covers manufacturers primarily engaged in weaving carpets and rugs from any textile yarn. Important products of this industry include Axminster, Wilton, velvet, chenille and similar woven carpets and rugs as well as woven auto and aircraft floor coverings.

SIC 2272 covers manufacturers primarily engaged in tufting carpets and rugs from any textile fiber. Important products of this industry include tufted carpets, rugs, scatter rugs and bathmat sets, except terry woven.

SIC 2279 covers manufacturers who make rugs, carpets, art squares, floor mattings, needle punch carpeting, door mats and mattings from twisted paper, grasses, reeds, coir, sisal, jute or rugs.

**Each business location is counted as a separate establishment.

#Value added by manufacture is derived by subtracting the cost of finished products, materials, supplies, fuel, electric energy and contract work from the value of shipments (including resales of finished products) plus the net change in the value of finished products and work-in-process inventories between the beginning and end of the year, without adjustment for price changes.

##Value of shipments represents the net selling values, f.o.b. plant, after discounts and allowances, and excluding freight charges and excise taxes. This value includes both products described as primary to the industry as well as secondary products and miscellaneous receipts. This value should be clearly distinguished from the total value of floor coverings made by all producers, including those classified in other industries. This total product value is shown on page 10.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977, 1972.

LOCATION OF THE INDUSTRY

Georgia was the location of 53.7% of all soft surface floor coverings mills in 1977, according to the 1977 Census of Manufacturers. In the tufted carpet and rug industry, Georgia accounted for 63.5% of all mills and 62.9% of the total value of shipments.

Location of the Soft Surface Floor Coverings Industry, 1977

	No. of Mills		Value of Shipments	Value Added by Manufacture
	Total	With 20+ Employees	(Mil. $)	(Mil. $)
Woven carpets & rugs				
(SIC 2271)*	71	16	$ 138.7	$ 47.1
Leading states:				
Georgia	16	1	**	3.0
South Carolina	11	5	58.0	18.6
Pennsylvania	10	5	**	**
North Carolina	9	2	**	**
Total, leading states	46	13	**	**
Tufted carpets & rugs				
(SIC 2272)*	449	251	$4,520.7	$1,438.2
Leading states:				
Georgia	285	161	2,844.2	892.3
California	71	37	505.2	162.8
North Carolina	19	5	**	**
Tennessee	11	6	102.3	23.7
South Carolina	10	8	265.8	78.1
Pennsylvania	6	5	166.7	54.5
Total, leading states	402	222	**	**
Carpets & rugs, n.e.c.				
(SIC 2279)*	72	18	$ 115.2	$ 44.8
Leading states:				
Georgia	17	4	14.3	6.3
North Carolina	12	2	7.3	3.7
Pennsylvania	7	2	**	**
Rhode Island	5	3	**	**
Total, leading states	41	11	**	**

*For definitions of these SIC numbers, see page 3.
**Withheld by the Census Bureau to avoid disclosing operations of individual companies.

Source: U.S. Bureau of the Census
1977 Census of Manufactures
Industry Series MC77-1-22D
Floor Covering Mills.

GENERAL STATISTICS ON THE INDUSTRY

Employment & Earnings

The most recent Bureau of Labor Statistics on employment in the floor covering industry reflects the downturn in housing construction and the U.S. economy in general. Employment in the industry as of June 1980 was approximately 52,000, down 15.3% from 61,400 employed in the industry in June, 1979. The number of production workers employed in the industry fell 15.9% in the same period. The average number of hours worked per week by production workers was also down from a year ago. As a result, average weekly earnings declined slightly, despite an increase in the average hourly pay.

Employment & Earnings in the Floor Coverings Industry (SIC 227)*

	Monthly Averages			Annual Averages		
	June 1980(p)	June 1979	% Change 1980/1979	1979	1978	% Change 1979/1978
All employees (thous.)	52.0	61.4	- 15.3%	60.3	60.9	- 1.0%
Production workers (thous.)	42.2	50.3	- 16.1	49.1	49.3	- 0.4
Avg. weekly earnings	$197.10	$199.61	- 1.3	$197.89	$185.15	+ 6.9
Avg. hourly earnings	$ 5.08	$ 4.73	+ 7.4	$ 4.78	$ 4.44	+ 7.7
Avg. weekly hours	38.8	42.2	- 8.1	41.4	41.7	- 0.7
Avg. overtime hours	2.6	4.8	- 45.8	4.4	4.4	--

*For a definition of this SIC number, see page 3.
(p) = preliminary

Source: U.S. Bureau of Labor Statistics
Employment & Earnings
August & September 1980.

CONCENTRATION IN THE INDUSTRY

Number of Floor Coverings Mills
By Employment Size
(Employment as of mid-March, 1977)

	Woven Carpets & Rugs (SIC 2271)*	Carpets & Rugs, n.e.c. (SIC 2279)*
Total mills	71	72
Employment size:		
Under 10 employees	45	45
10 - 49 employees	14	19
50 - 99 employees	6	3
100 or more employees	6	5

(continued)

Number of Floor Coverings Mills
By Employment Size
(Employment as of mid-March, 1977)
(continued)

	Tufted Carpets & Rugs (SIC 2272)*
Total mills	449
Employment size:	
Under 10 employees	145
10 - 49 employees	124
50 - 249 employees	122
250 - 999 employees	51
1,000 employees or more	7

*For definitions of these SIC numbers, see page 3.
n.e.c. = not elsewhere classified

Source: U.S. Bureau of the Census
1977 Census of Manufactures
Industry Series MC77-1-22D
Floor Covering Mills.

Employment & Share of Shipments in Large Mills, 1979

	No. of Mills		% of Total Shipments
	With 20+ Employees	With 100+ Employees	Accounted For By Mills With 100+ Employees
Woven carpets & rugs (SIC 2271)*	60	24	82%
Tufted carpets & rugs (SIC 2272)*	245	137	90
Carpets & rugs, n.e.c. (SIC 2279)*	33	7	61

*For definitions of these SIC numbers, see page 3.
n.e.c. = not elsewhere classified

Source: Sales & Marketing Management Magazine
1980 Survey of Industrial Purchasing Power
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CONCENTRATION IN THE INDUSTRY

Over half of all companies engaged primarily in the manufacture of tufted carpets and rugs had shipments valued at $100,000 or more in 1977. The percentage was even higher (65.3%) for firms classified in the carpet and rugs, n.e.c. (not elsewhere classified) industry. Companies with shipments of $100,000 or more accounted for 32.4% of woven carpet and rug manufacturers.

Number of Companies With Shipments of $100,000 or More in 1977

	No. of Companies	No. With Shipments Over $100,000
Woven carpets and rugs (SIC 2271)*	71	23
Tufted carpets and rugs (SIC 2272)*	397	204
Carpets and rugs, n.e.c. (SIC 2279)*	72	47

*For a definition of these SIC numbers, see page 3.
n.e.c. = not elsewhere classified

Source: U.S. Bureau of the Census
1977 Census of Manufactures
Floor Coverings Mills MC77-1-22D.

MANUFACTURER OPERATING RATIOS

Selected Key Business Ratios for the Tufted Carpet & Rug Industry
(Median Figures)

	Tufted Carpets & Rugs (SIC 2272)*
No. of firms reporting	57
Current assets to current debt (times)	1.52
Net profits on net sales (times)	1.89
Net profits on net worth (percent)	26.63
Net sales to inventory (times)	7.0

*For a definition of these SIC numbers, see page 3.

Source: Dun & Bradstreet, Inc.
Business Economic Division
Key Business Ratios
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Sales & Profits of Leading Publicly-Held Floor Covering Manufacturers
1978, 1979 Fiscal Years
(Millions of Dollars)

		Total Consolidated				Floor Covering Division			
				Operating		% of		% of Operating	
	Fiscal Yr.	Sales		Profit		Sales		Profit	
	Ended	1979	1978	1979	1978	1979	1978	1979	1978
Armstrong Cork**	12/31/79	$1,341.1	$1,244.1	$170.2	$169.3	54%	57%	54%	65%
Burlington Ind.	9/29/79	2,676.3	2,421.2	192.0	168.3	14*	14*	44*	61*
Collins & Aikman***	3/ 1/80	599.3	576.5	39.6	54.7	na	na	na	na
Dan River	12/29/79	579.2	530.4	57.4	41.2	21*	21*	11*	9*
Fieldcrest Mills	12/31/79	517.7	463.6	54.0	51.3	22	22	na	na
Galaxy Carpet Mills	9/29/79	96.4	90.8	5.4	8.5	100	100	100	100
Keller Industries	7/31/79	179.4	157.4	15.9	18.9	9	10	--	--
C. H. Masland & Sons	12/31/79	166.2	175.5	(1.3)	8.9	81	78	--	#
Mohasco	12/31/79	747.1	712.5	28.0	33.6	21	21	16	23
Monsanto	12/31/79	6,192.6	5,018.7	487.3	626.0	17*	19*	--	--
Salem***	12/29/79	197.7	169.6	11.3	19.5	100	100	100	100
Shaw	6/30/79	178.2	150.6	13.7	10.8	100	100	100	100
Sperry & Hutchinson	12/29/79	821.0	807.1	65.1	63.2	28	27	21*	49*
J. P. Stevens***	11/ 3/79	1,833.1	1,651.4	136.0	113.1	29	34	26	29
West Point Pepperell	8/25/79	1,012.6	885.2	60.8	67.3	32	26	95*	95*

na = not available
() = loss
*Figures are for the particular division of which floor covering is a part.
**Includes resilient floor covering as well as textile floor covering.
***Collins & Aikman: Fiscal 1978 contains 53 weeks.
Salem: Fiscal 1978 contains 48 weeks.
J. P. Stevens: Fiscal 1979 contains 53 weeks.
#Operating profit exceeds total corporate operating profit due to losses in other divisions.

Source: Market Research Department
Fairchild Publications based on
published annual reports.

SHIPMENTS

Total value of rugs, carpets and carpeting shipped by all producers reached $5.1 billion in 1979, a 7.0% increase over the 1978 shipment value of $4.8 billion, according to the Census Bureau. The quantity of goods shipped went up 3.8% to 1.2 billion square yards.

Woven carpets and rugs increased 12.5% in value and 12.1% in quantity, while tufted carpets and rugs rose 7.0% in value and 4.2% in quantity shipped during 1979.

The Carpet and Rug Institute predicts shipments of all carpets and rugs made in the U.S. will increase at a real annual rate of 3.7% through 1984. However, due to current economic conditions, shipments in 1980 are expected to be 2.9% below 1979 levels.

Tufted carpet shipments, which comprised almost 96% of the carpet and rug market in 1979, are expected to rise 23.1% in the next four years, according to the Institute. Woven carpet shipments and all other types of carpet and rug shipments will remain unchanged through 1984, except for small fluctuations.

Forecast for Shipments of the U.S. Carpet & Rug Industry
1980 - 1984
(Millions of square yards)

	1980	1981	1982	1983	1984	% Change 1984/1980
Total carpet and rug shipments	1,184	1,243	1,318	1,383	1,446	+22.1%
Tufted, total	1,133	1,192	1,267	1,332	1,395	+23.1
Woven, total	19	20	20	19	19	--
All other types, total	31	31	31	31	31	--

Source: Carpet and Rug Institute
January 22, 1980.

SHIPMENTS

Quantity & Value of Shipments of Carpet & Rugs
By All U.S. Producers, 1978, 1979

	Quantity (Mil. sq. yds.)			Value (Mil. $)		
	1979	1978	% Change 1979/1978	1979	1978	% Change 1979/1978
Rugs, carpets & carpeting, total	1,207.1	1,162.3	+ 3.8%	$5,126.9	$4,790.6	+ 7.0%
Woven carpets & rugs, total	21.3	19.0	+ 12.1	200.3	178.1	+ 12.5
Tufted carpets & rugs, total	1,156.8	1,110.0	+ 4.2	4,805.4	4,492.8	+ 7.0
Scatter rugs, bathmats & sets (rugs 6'x9' and smaller)	80.7	81.1	- 0.5	252.0	247.4	+ 1.9
Roll goods & rugs larger than 6'x9', excl. artificial grass	973.7	947.3	+ 2.8	4,239.3	3,993.6	+ 6.1
Artificial grass for non-athletic surface	30.7	16.1	+ 90.7	70.8	43.2	+ 63.9
Auto & aircraft carpeting	71.6	65.5	+ 9.3	243.3	208.6	+ 16.6
Other carpets & rugs, total	28.0	33.2	- 15.7	93.4	101.6	- 8.1
Knitted	7.6	7.7	- 1.3	40.7	42.5	- 4.2
Needlepunched	14.8	19.3	- 23.3	32.4	33.5	- 3.3
Braided, hooked & other carpets & rugs, n.e.c.	5.5	6.3	- 12.7	20.3	25.6	- 20.7
Carpet tiles (tufted & needle-punched)	1.1	na	--	27.8	18.1	+ 53.6

n.e.c. = not elsewhere classified

Source: U.S. Bureau of the Census,
Current Industrial Reports
MQ-22Q(79)-5 Carpet & Rugs.

The Current Industrial Reports series, from which the above table is taken, is based on a representative sample of floor coverings manufacturers.

The census of manufactures, conducted every five years, is a complete count of all manufacturing firms which produce floor coverings and is therefore considered to be more accurate than the CIR.

The table below includes information on the quantity and value of shipments in the floor coverings industry by all U.S. producers, not just those classified in the industry, as covered in the 1977 census reports compared with the previous census in 1972.

SHIPMENTS

Quantity and Value of Shipments
By All Producers, 1972, 1977

	Quantity (Mil. sq. yds.)			Value (Mil. $)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Woven carpets and rugs	19.1*	28.7	- 33.4%	$ 167.9	$ 202.5	- 17.1%
Tufted carpets and rugs	1,039.5**	875.7	+ 18.7	4,172.2	2,634.1	+ 58.4
Carpets and rugs, n.e.c.	34.7*	68.5	- 49.3	93.0	105.8	- 12.1

*Indicates 20-29 percent of this figure has been estimated by the Census Bureau.
**Indicates 10-19 percent of this figure has been estimated by the Census Bureau.
n.e.c. = not elsewhere classified.

Source: U.S. Bureau of the Census
1977 Census of Manufactures
Floor Covering Mills MC77-1-22D.

MATERIALS CONSUMED IN PRODUCTION OF FLOOR COVERINGS

The consumption of face yarns by all producers in the manufacture of carpets and rugs rose 2.5% in 1979 to 1.8 billion pounds. Nylon fibers, both filament and spun, accounted for 80.6% of the face yarn used in production and was solely responsible for the overall gain in face yarn consumption. All other types of face yarn fiber declined in use from 1978 to 1979. The biggest drop was sustained by acrylic and modacrylic fibers, which declined 24.6% from 1978 levels.

The amount of materials used as secondary backing in carpets and rugs rose 5.8% in 1979 to 982.6 million square yards. Jute was the principal fiber used as a secondary backing. Man-made fibers, both woven and nonwoven, more than tripled in use from 1978 to 1979. Manufacturers used 92.8 million square yards of this fiber in 1979 but only 21.9 million square yards had been used the year before.

Materials Consumed in the Soft Surface Floor Coverings Industry, 1979

	Total	Woven	Bathmats & Throw Rugs 6'x9' & Smaller	Tufted roll goods & rugs larger than 6'x9'	Auto & Aero	Other Carpets & Rugs
Face yarns, total (mil.lbs.)	1,762.1	44.9	94.4	1,528.9	53.5	40.4
Wool & chiefly wool	13.5	4.9	(D)	8.2	--	(D)
Nylon, filament	678.2	28.2	13.5	624.7	(D)	9.3
Nylon, spun	743.1		36.4	667.1	29.7	
Acrylic & modacrylic	53.8	9.0	(D)	35.4	(D)	5.9
Polyester	165.6	(D)	30.9	128.8	4.0	1.4
Polypropylene	87.4	(D)	1.3	55.6	(D)	21.5
All other yarns	20.5	(D)	(D)	9.1	(D)	(D)
Primary backing, total (mil. sq. yds.)	--	33.2	70.5	1,019.6	62.1	18.3
Cotton	--	2.1	(D)	85.0	--	(D)
Jute	--	15.4	(D)		37.7	(D)
Man-made & other	--	15.8	64.9	934.6	24.4	15.5
Secondary backing, total (mil. sq. yds.)	982.6	(D)	76.1	1,084.3	20.9	(D)
Jute	593.9	(D)	(D)	583.3	(D)	--
Man-made, woven & nonwoven	92.8	--	--	92.8	--	--
Cushion backing	219.9	2.8	33.8	176.2	(D)	(D)
Foam or high sponge	195.9	(D)	26.0	162.7	(D)	(D)
Other (polyurethane, etc.)	24.1	(D)	7.8	13.5	(D)	(D)
Other (scrim, nonwoven, solid vinyl, etc.)	75.9	(D)	(D)	55.7	(D)	(D)

(D) = Withheld to avoid disclosing figures for individual companies.

Source: U.S. Bureau of the Census, Current Industrial Reports Carpet & Rugs MQ-22Q (79).

MATERIALS CONSUMED IN PRODUCTION OF FLOOR COVERINGS

Fiber Consumption in Carpets & Rugs, 1977, 1978
(Millions of Pounds)

	1978	1977
Face yarns		
Total fiber	1,927.7	1,787.3
Man-made fiber, total	1,912.5	1,777.6
Rayon + Acetate		
Yarn	--	**
Staple	--	1.0
Other		
Yarn	747.7	672.3
Staple	1,164.8	1,099.3
Cotton	2.0	1.9
Wool	13.2	12.8
Backing*		
Total fiber	227.5	205.3
Man-made fiber, total	223.7	201.7
Rayon + Acetate		
Yarn	--	**
Staple	--	--
Other		
Yarn	210.9	194.5
Staple	12.8	7.2
Cotton	3.8	3.6
Wool	--	--

*Does not include jute used as woven primary and secondary backing or wool, hair and jute used in carpet and rug pads and cushions.
**Less than 50,000 pounds used.

Source: Textile Economics Bureau,
"Textile Organon," November 1979.

PRODUCER PRICE TRENDS

In the first eight months of 1980, the Producer Price Index for all floor coverings has risen 9.0% over the 1979 annual average after rising only 4.4% last year compared to 1978. The Index for soft surface floor coverings has increased 8.1% so far in 1980. From 1978 to 1979, it increased only 3.0%.

PRODUCER PRICE TRENDS

Producer Price Index for Floor Coverings
(1967 = 100 unless otherwise noted)

	Jan.-August 1980	Annual Averages 1979	1978	% Change 8 Mo. 1980/ 1979	1979/ 1978
Floor coverings	161.2	147.9	141.6	+ 9.0%	+ 4.4%
Soft surface floor coverings	140.5	130.0	126.2	+ 8.1	+ 3.0
Tufted broadloom, polyester*	--	117.5	114.8	--	+ 2.3
Tufted broadloom, nylon	--	na	109.0	--	--
Tufted broadloom, acrylic	--	132.5	125.6	--	+ 5.5

*Dec. 1968 = 100

Source: U.S. Bureau of Labor Statistics.

FOREIGN TRADE

Imports

The value of imports of carpets and rugs rose 29.1% in 1979 over 1978. Pile hand-inserted or knotted rugs represented 56% of the 1979 total, gaining almost 52% compared with 1978, when this type represented 49% of reported imports in terms of value.

FOREIGN TRADE

Imports

Imports of Carpets & Rugs by Leading Countries of Origin, 1978, 1979

	Quantity (Thous. Sq. Ft.)			Value* (Thous. $)		
	1979	1978	% Change 1979/1978	1979	1978	% Change 1979/1978
Floor coverings, total	168,111.9	na	--	$277,315	$214,853	+ 29.1%
Pile hand inserted or knotted during weaving or knitting, total	18,773.9	15,653.1	+ 19.9%	154,299	101,652	+ 51.8
India	7,323.5	7,283.8	+ 0.5	36,398	30,768	+ 18.3
Iran	4,103.5	3,101.2	+ 32.3	57,628	32,267	+ 78.6
Pakistan	2,993.3	2,051.6	+ 45.9	24,730	14,171	+ 74.5
Over 50% wool pile or tufted inserted in pre-existing base, not over 40 cents per square foot, total	406.1	48.8	+842.8	77	15	+413.3
Over 50% wool pile or tufted inserted in pre-existing base, over 40 cents per square foot, total	3,544.5	3,508.6	+ 1.0	9,308	7,805	+ 19.3
Mainland China	605.6	458.5	+ 32.1	1,695	1,147	+ 47.8
England	534.3	966.1	- 44.7	1,220	1,025	+ 19.0
Greece	510.1	250.0	+104.0	682	333	+104.8
Hong Kong	350.2	329.7	+ 6.2	1,878	1,617	+ 16.1
Pile or tufts inserted and knotted by hand, n.s.p.f., total	22,808.6	14,105.6	+ 61.7	6,248	5,668	+ 10.2
Canada	20,915.1	11,440.3	+ 82.8	3,353	2,025	+ 65.6
Netherlands	617.8	497.5	+ 35.0	523	386	+ 35.5
Japan	514.9	1,679.0	- 69.3	1,083	2,507	- 56.8
Cotton, pile inserted or knotted during weaving or knitting, not by hand, total	5,378.7	6,960.3	- 22.7	3,368	4,151	- 18.9
Belgium	3,593.9	4,481.6	- 19.8	2,345	2,961	- 20.8
Brazil	1,647.4	1,796.4	- 8.3	919	632	+ 45.4
Coir, pile inserted or knotted during weaving or knitting, not by hand, total	3,953.4	4,032.4	- 2.0	2,533	2,316	+ 9.4
India	3,777.2	3,829.2	- 1.4	2,268	2,011	+ 12.8
Textile materials except cotton, pile inserted or knitted during weaving or knitting, not by hand, n.s.p.f., total	72,036.5	70,283.9	+ 2.5	76,292	63,672	+ 19.8
Canada	32,262.1	33,722.9	- 4.3	5,483	3,397	+ 61.4
Belgium	17,019.9	16,137.4	+ 5.5	28,808	24,862	+ 15.9
England	11,812.4	11,973.1	- 1.3	22,340	20,408	+ 9.5

(continued)

Imports

Imports of Carpets & Rugs by Leading Countries of Origin, 1978, 1979
(continued)

	Quantity (Thous. Sq. Ft.)			Value* (Thous. $)		
	1979	1978	% Change 1979/1978	1979	1978	% Change 1979/1978
Braids, except tubular braid with a core, textile materials, n.s.p.f., total	706.5	644.1	+ 9.7%	$ 531	$ 427	+ 24.4%
Japan	396.8	434.7	- 8.7	367	310	+ 18.4
India	166.7	na	--	83	na	--
Over 50% wool of braids, cords & fabric strips, excl. of any core, n.s.p.f., total	30.0	65.1	- 53.9	12	38	- 68.4
Wool, braids, cords & fabric strips, n.s.p.f., total	0.7	4.5	- 84.4	10	6	+ 66.7
Man-made fibers, braids, cords & fabric strips, n.s.p.f., total	12,788.4	22,876.4	- 44.1	5,372	8,910	- 39.7
Japan	12,616.3	22,753.2	- 44.5	5,306	8,861	- 40.1
Textile materials, braids, cords & fabric strips, n.s.p.f. total	1,292.5	1,411.2	- 8.4	420	491	- 14.5
Philippine Republic	823.1	903.5	- 8.9	180	206	- 12.6
India	212.7	244.5	- 13.0	129	132	- 2.3
Wool, woven, not made on a power-driven loom, n.s.p.f., total	2,450.6	2,750.6	- 10.9	6,001	7,054	- 14.9
India	1,254.6	1,204.7	+ 4.1	2,626	2,508	+ 4.7
Afghanistan	160.3	149.9	+ 6.9	382	332	+ 15.1
Federal Republic of Germany	143.5	414.0	- 65.3	230	733	- 68.6
Iran	90.9	146.8	- 38.1	414	1,190	- 65.2
Wool, n.s.p.f., total	848.2	742.7	+ 14.2	1,441	1,499	- 3.9
Canada	278.7	173.9	+ 60.3	292	335	- 12.8
Denmark	160.6	na	--	165	na	--
Spain	145.2	46.0	+215.6	101	74	+ 36.5
Portugal	44.5	59.7	- 25.5	447	146	+206.2
Textile materials except wool, n.s.p.f., total	23,039.3	na	--	11,403	11,149	+ 2.3
India	9,782.0	na	--	2,973	3,126	- 4.9
Ireland	3,606.6	na	--	2,219	1,685	+ 31.7
Netherlands	3,494.6	na	--	2,679	2,519	+ 6.3

na = not available
n.s.p.f. = not specially provided for
*The value of imports is the C.I.F. (cost, insurance, freight) value, which is based on the purchase price and includes freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census
FT 135 U.S. General Imports
December 1979, 1978.

FOREIGN TRADE

Exports

Exports of soft surface floor coverings reached a value of $207.2 million (f.a.s.) in 1979, considerably higher (by 50.7%) than the 1978 export value of $137.5 million. The quantity of carpets and rugs exported equaled 45.5 million square yards, a 38.9% jump from 1978. Tufted carpets and rugs of noncellulosic fibers had an export value of $89.5 million, exactly double their 1978 value while the quantity exported rose 94.3%, to 19.8 million square yards.

The $207 million export value allowed the U.S. to narrow the balance of trade deficit in regards to soft surface floor coverings to minus $70.1 million. In 1978, this deficit was minus $77.4 million.

Exports of Carpets & Rugs by Leading Countries of Importation, 1978, 1979

	Quantity (Thous. Sq. Yds.)			Value* (Thous. $)		
	1979	1978	% Change 1979/1978	1979	1978	% Change 1979/1978
Floor coverings, total exports	45,531.3	32,780.3	+ 38.9%	$207,208	$137,483	+ 50.7%
Tufted, of cotton, total	1,050.9	1,193.5	- 11.9	4,586	4,217	+ 8.7
Australia	187.5	101.6	+ 84.5	1,036	511	+102.7
Canada**	184.8	291.6	- 36.6	580	870	- 33.3
Switzerland	109.5	10.3	+963.1	304	108	+181.4
Tufted, of cellulosic fibers, total	1,919.0	1,668.6	+ 15.0	7,315	6,609	+ 10.7
Canada**	1,478.0	1,339.4	+ 10.3	5,139	5,036	+ 2.0
Japan	107.8	55.9	+ 92.8	546	207	+163.8
Tufted, of noncellulosic fibers, total	19,833.1	10,206.1	+ 94.3	89.488	44,739	+100.0
England	4,578.8	955.3	+379.3	22,883	4,214	+443.0
Saudi Arabia	3,690.2	1,692.1	+118.1	17,545	7,368	+138.1
Tufted, other textile materials, except cotton & man-made fibers, n.s.p.f., total	10,085.8	7,586.8	+ 32.9	49,260	34,639	+ 42.2
Saudi Arabia	2,061.6	1,521.4	+ 35.5	11,620	7,497	+ 55.0
Australia	1,962.5	1,696.6	+ 15.7	8,096	5,818	+ 39.1
Canada**	1,172.1	1,621.9	- 27.7	5,312	7,132	- 25.5
Machine woven, of wool, total	219.0	244.5	- 10.4	3,502	2,636	+ 32.9
Federal Republic of Germany	73.0	37.7	+ 93.6	1,603	708	+126.4
Switzerland	35.7	11.1	+221.6	773	361	+114.1
Machine woven, of man-made fibers, total	4,661.7	3,764.3	+ 23.8	25,424	17,779	+ 43.0
Sweden	838.6	553.9	+ 51.4	3,335	1,969	+ 69.4
Saudi Arabia	689.0	390.5	+ 76.4	5,301	2,440	+117.2
Belgium	553.8	216.3	+156.0	1,737	784	+121.6

(continued)

FOREIGN TRADE

Exports

Exports of Carpets & Rugs by Leading Countries of Importation, 1978, 1979
(continued)

	Quantity (Thous. Sq. Yds.)			Value* (Thous. $)		
	1979	1978	% Change 1979/1978	1979	1978	% Change 1979/1978
Machine woven, of other textile materials, except wool and man-made fibers, total	1,300.4	1,182.8	+ 9.9%	$ 7,023	$ 5,804	+ 21.0%
Canada**	289.7	258.0	+ 12.3	1,169	1,038	+ 12.6
Saudi Arabia	138.0	294.4	- 53.1	964	1,079	- 10.7
Federal Republic of Germany	111.4	64.5	+ 72.7	590	460	+ 28.3
Needlepunched, of man-made fibers, total	521.6	630.9	- 17.3	1,483	1,933	- 23.3
Canada**	250.6	348.7	- 28.1	672	1,210	- 44.5
Australia	221.3	211.4	+ 4.7	552	465	+ 18.7
Other floor coverings, including braided & knitted, of man-made fibers, excluding needle-punched, total	606.3	1,054.2	- 42.5	2,724	4,737	- 42.5
Canada**	104.1	234.5	- 55.6	400	965	- 58.5
Mexico	58.6	36.5	+ 60.5	226	164	+ 37.8
Other floor coverings, including braided & knitted, of other textile materials, except man-made, total	3,078.5	3,934.7	- 21.8	12,476	17,508	- 28.7
Canada**	962.2	1,491.7	- 35.5	2,522	3,701	- 31.9
England	443.0	208.5	+112.5	2,237	1,107	+102.1
Ireland	271.4	na	--	223	na	--
Federal Republic of Germany	217.6	289.9	- 44.2	2,154	4,999	- 56.9
Floor covering underlays of textile materials, total	2,255.0	1,313.9	+ 71.6	3,927	2,367	+ 65.9
England	828.4	247.1	+235.2	1,020	365	+179.4
Canada**	266.3	374.4	- 28.8	466	753	- 38.1
Federal Republic of Germany	216.2	39.2	+451.5	460	118	+289.8

*The value of exports is generally equivalent to a f.a.s. (free alongside ship) value at the U.S. port of export. It is based upon the transaction price, including inland freight, insurance and other charges incurred in placing the merchandise alongside the carrier.
**The quantity and value of exports to Canada have been estimated by the Census Bureau on a 10% sample of shipments valued between $501-$1,999 (approximately 3% of Canadian exports).
n.s.p.f. = not specially provided for
na = not available

Source: U.S. Bureau of the Census
FT 410 U.S. General Exports
December 1979, 1978.

DISTRIBUTORS

According to responses from 109 members of the National Association of Floor Covering Distributors (NAFCD), distributors averaged a modest 3.4% sales increase in the first half of 1980, compared to the first half of 1979. During this six month period, profits barely rose, (averaging +0.3%) compared to a year ago.

The survey participants were not optimistic for the second half of 1980. As a whole, they expected sales to be even with the last half of 1979, but expected profits to fall an average of 3.5% in comparison to 1979. Distributors in five regions of the country anticipated an improvement in sales over 1979, but these gains were offset by the anticipation of sales declines of 5.5% in the East North Central region and 5.8% in the West North Central region. Only distributors in the West expect profits to rise above what they were in the second half of 1979.

Floor Coverings Distributors Sales Performance
First Half 1980/First Half 1979

	Average Percent Change In: Sales	Profits
Total U.S.	+ 3.4%	+ 0.3%
Northeast	+12.1	+ 9.8
South Atlantic	+ 2.7	+ 0.5
East North Central	+ 2.7	+ 7.1
South Central	+ 6.9	- 3.1
West North Central	+ 1.3	-11.8
Mountain	- 3.1	- 4.6
West (includes Hawaii)	+ 1.0	+ 3.9
No identifiable region	+ 4.8	- 2.0

In 1979, the NAFCD undertook a survey to obtain a composite profile of its members. The survey results were issued in September 1979 based on 152 respondents. Some of the results were as follows:

*The average floor covering distributor has been in business 23.5 years and employs 38 people.

*Carpets account for 40.9% of total sales for these distributors. Resilient sheet goods are responsible for an additional 17.5% of sales. Cushion/padding sales equal 9.4% of the total, while rugs account for 2.2%.

*Average inventory turnover is approximately 5 times yearly.

*By 47.5% to 45.6%, a slightly higher percentage of distributors sell more private label carpeting than manufacturer branded carpet.

*Carpets are carried by 90.1% of the floor covering distributors surveyed. Cushion/padding were carried by 87.5%. Only 16.4% carried rugs.

*Almost half of the average sales are to carpet specialty stores. The percentage of distributor sales accounted for by various types of customers is noted in the following table.

(continued)

DISTRIBUTORS

	Average Percent of Sales
Carpet specialty stores	48.7%
Furniture stores	10.1
Home centers/home improvement stores	12.8
Installers	10.4
Paint & wallpaper stores	5.8
Contract designers/specifiers	5.8
Department stores	3.2
Mass merchandisers	3.2
Total	100.0%

THE CONTRACT MARKET

Sales of carpets and rugs for the carpet contract market represent a large percentage of total volume accounting for an estimated 45% to 50% of total industry shipments on a square yard basis. Trade sources expect total sales for the carpet contract market to reach $2.8 billion by 1980, and with an annual replacement rate of 13%, the contract market represents a viable marketing opportunity for carpet manufacturers and distributors. These projections, however, are closely allied to the growth of the total floor coverings industry.

Carpets ease-care maintenance, its acoustical and insulating qualities, its appearance and comfort are gaining increasing acceptance and widespread recognition by a growing number of architects, contractors and purchasing agents in addition to builders buying for both single and multi-family dwellings. As a result, carpet is being used more frequently in schools, offices and hospitals as well as in hotels, motels, theaters and restaurants.

The residential carpet contract market is currently the largest segment of the contract market. This is due in part to the demand by housing developers for a quality broadloom sold on a contractual basis which acts as an incentive for new home buyers. The commercial contract market is also doing well and is expected to reach in excess of $1.5 billion in sales by 1980, surpassing the residential contract market.

The market for contract carpet, according to a consensus among mills and contract dealers is distributed as follows:

Category	% of Market
Hotels, motels	17.0%
Stores, restaurants	24.5
Office buildings	13.8
Activity buildings, airports, theaters	18.1
Schools	18.1
Hospitals	8.5
Total	100.0%

It must also be noted that because residential carpet grades are frequently sold at the retail level for non-residential uses while carpet grades developed for commercial purposes are also sold for use in the home, an accurate measure of the amount of carpeting going into the carpet contract market is difficult to determine.

CONTRACT MARKET

The potential for future growth in the contract market is bright due in part to the amount of new non-residential structures being erected in the United States. As shown in the accompanying table, the value of new non-residential buildings put in place in 1979 was 19.9% higher than the value of similar structures erected in 1978.

New Construction in Place in the United States:
Non-Residential Buildings, 1978, 1979
(Millions of Dollars)

	1979		1978	
	Value	% of Total	Value	% of Total
Private & public construction, total	$60,546	100.0%	$50,476	100.0%
Private construction, total	46,005	76.0	36,293	71.9
Industrial	14,423		10,994	
Office buildings	9,196		6,574	
Other commercial buildings	15,037		11,991	
Religious	1,532		1,248	
Educational	802		729	
Hospital & institutional	3,503		3,347	
Miscellaneous	1,514		1,410	
Public construction, total	14,541	24.0	14,183	28.1
Housing & redevelopment	1,200		1,053	
Industrial	1,409		1,183	
Educational	6,787		6,264	
Hospital	1,649		1,822	
Other public buildings	4,696		4,914	

Source: U.S. Department of Commerce
Construction Review
June, 1980.

AT THE RETAIL LEVEL

THE POTENTIAL MARKET

While immediate prospects for the floor covering industry over the next two years are not bright, the long-term trends apparent in the U.S. seem to indicate good times for the industry are just around the corner. For now, the U.S. economy will have an adverse effect on the floor coverings market.

The number of housing starts in the U.S. slumped to 1.7 million in 1979 from a record-shattering 2 million in 1978. After the first six months of 1980, housing starts were at an estimated seasonally adjusted annual rate of only 1.2 million, according to the Census Bureau. The downturn in housing has a delayed effect on the entire home furnishings market, including floor coverings. Because of this, the Carpet & Rug Institute predicts shipments of carpet and rugs will be 3% below 1979 shipment levels.

When the recession is over, however, demographic and lifestyle trends in U.S. society point to increased sales for floor coverings. One such trend is the number of new households it is expected will be formed in the next decade. Due to the difficulty in forcasting changes in lifestyles, the Census Bureau has developed four projections of household growth in the 1980's. The most optimistic projection, which assumes a continuance of the current trend toward single person households, projects a 23% increase in the number of households formed in the next ten years. The most pessimistic projection anticipates a 16% growth in the coming decade.

Projected Number of Households 1980-1990
(In Thousands)

	Estimated Total*	1980	1985	1990	% Change 1990/1980
Series A	76,030	80,135	89,705	98,950	+ 23.5%
Series B	76,030	79,870	88,565	96,653	+ 21.0
Series C	76,030	79,704	88,514	96,792	+ 21.4
Series D	76,030	79,349	86,393	92,394	+ 16.4

* Estimated total as of March 1978.

Source: U.S. Bureau of the Census
Current Population Reports
Series P-25, No. 805 (May 1979).

No matter which forecast series is used, persons in the age brackets 35-44 and 45-54 are most likely to be the householder (formerly known as "head of the household"). These two age groups, along with the 25-34 year old age bracket, will grown in numbers faster than the others in the next decade. It has been reported that the 25-44 age group spends 36% more for durable goods than any other age group, and the home furnishings market will particularly benefit from these trends. In addition, with the growing number of two-income households, they present an increasingly affluent market segment.

The attractiveness of floor coverings as potential energy-savers, due to their insulating qualities, is also expected to increase sales among an increasingly energy-and cost-conscious market.

CONSUMER EXPENDITURES

An analysis of National Income & Product Accounts by the Bureau of Economic Analysis, U.S. Department of Commerce, which drew on findings in the 1972 Census of Retail Trade, has yielded data on personal consumption expenditures for soft surface floor coverings and underlays. Based on data on personal consumption expenditures for a broader classification of products reported by the Bureau for 1979, projections on spending for floor coverings have been projected for that year.

The figures reflect retail sales, and do not include the contract or institutional market. The value at retail of the market for soft surface floor coverings is currently estimated at from $6 to $7 billion.

Estimated Personal Consumption Expenditures For Soft Surface Floor Coverings
(In Billions of Dollars)

	1972	Projected 1979
Soft surface floor covers & underlays, total	$ 3.1	$ 6.0
Soft surface floor coverings	2.8	5.5
Cushions & underlays	0.3	0.5

RETAIL SALES BY STORE TYPE

Detailed information on retail sales, analysed by merchandise categories by store type, is compiled every five years by the U.S. Bureau of the Census in a complete census of retail trade. Findings in the most recent census, covering operations in the year 1977, are summarized below.

Combined sales of hard and soft surface floor coverings in retail stores with payrolls amounted to $5.8 million in 1977, according to the U.S. Census Bureau. Of this total, 72.6%, or $4.2 million, was identified as being soft surface floor covering sales. Among the retail outlets for which soft surface sales were broken out, floor covering specialty stores held a 63.0% share of sales although they accounted for only 28.7% of the outlets. Furniture stores, with 39.3% of the stores in this category, produced 15.0% of soft surface volume while department stores were responsible for 19.4% of the reported sales.

Among those stores which do not separately report hard and soft surface floor coverings sales, home improvement centers held the largest share, 7.4% of total sales. General merchandise stores (except department stores) accounted for an additional 2.1% of sales.

RETAIL SALES BY STORE TYPE

Floor Coverings Sales Share by Type of Retail Outlet, 1977
(Stores With Payrolls Only)

	Stores			Sales		
	Number*	% of Total		Thous. $	% of Total	
Floor coverings sales, total	65,697	100.0%		$5,770,333	100.0%	
Soft surface (separately reported)	36,089	54.9	100.0%	4,191,795	72.6	100.0%
Floor coverings stores	10,385	15.8	28.7	2,639,652	45.7	63.0
Department stores**	6,064	9.2	16.8	813,935	14.1	19.4
Furniture stores	14,180	21.4	39.3	628,987	10.9	15.0
Mail order houses	3,563	5.4	9.9	53,764	0.9	1.3
Household appliance stores	679	1.0	1.9	26,779	0.5	0.6
Home textiles stores	883	1.3	2.4	21,573	0.4	0.5
Miscellaneous home furnishings stores	335	0.5	0.9	7,105	0.1	0.2
Hard surface (separately reported)	20,495	31.2	--	941,403	16.3	--
Floor coverings, type not specified	27,008	41.1	--	637,135	11.0	--
Home improvement centers, building material, paint, glass and wallpaper stores, etc.	10,991	16.7	--	427,654	7.4	--
General merchandise stores (except department stores)	11,535	17.6	--	122,421	2.1	--
All other outlets	4,482	6.8	--	87,060	1.5	--

*Each store unit is separately counted, regardless of whether or not it is part of a multi-unit operation.

**Includes all outlets meeting the official Standard Industrial Classification (SIC) definition of a department store, regardless of type of operation (discounter or traditional). This category includes catalog order-desk volume, but not orders entirely by mail through catalog headquarters, which are included in mail order houses.

Source: U.S. Bureau of the Census
1977 Census of Retail Trade
Merchandise Line Sales RC77-L.

RETAIL SALES BY STORE TYPE

Floor Coverings Specialty Stores

There were a total of 17,199 floor coverings stores in operation in 1977, according to the Census Bureau, with total sales of $4.0 billion. Comparable figures are not available in the previous census covering 1972, which limited counts to stores in this category which had payrolls. In 1977, there were 11,195 stores with payrolls, representing a gain of almost 18% compared with the 1972 count, and sales were up 65.2%.

Floor Coverings Stores, 1972, 1977

	All Stores, 1977		Stores With Payrolls					
			No. of Stores			Sales (Mil. $)		
	No. of Stores	Sales (Mil. $)	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Floor coverings stores	17,199	$4,033.0	11,195	9,501	+17.8%	$3,798.0	$2,299.4	+65.2%

Source: U.S. Bureau of the Census
1977 Census of Retail Trade
Establishment & Firm Size RC77-S-1.

Of the total 17,199 floor coverings stores operated in 1977, 14,808 stores were operated for the entire year. Stores with an annual sales volume of $1 million or more, although they accounted for only 4.3% of stores operated the entire year, held 28.8% of the total $3.8 billion in sales.

Number of Floor Coverings Stores by Sales Size, 1977

	Number	Sales (Thous. $)	% of Total No.	% of Total Sales
All establishments*	14,808	$3,780,448	100.0%	100.0%
$1 million & over	637	1,088,390	4.3	28.8
$2 million & over	143	425,135	1.0	11.2
$1 million-1,999,000	494	663,255	3.3	17.5
Less than $1 million	14,171	2,692,058	95.7	71.2
$500,000-999,000	1,451	982,500	9.8	26.0
$300,000-499,000	1,851	711,420	12.5	18.8
$100,000-299,000	4,185	772,709	28.3	20.4
Less than $100,000	6,684	225,429	45.1	6.0

*Includes only establishments operated the entire year.

Source: U.S. Bureau of the Census
Establishment & Sales Size
RC77-S-1.

RETAIL SALES BY STORE TYPE

Floor Coverings Specialty Stores

The 1977 census provides information on sales by major merchandise classifications in floor coverings specialty stores. In 1977 there were 11,195 floor coverings stores with payrolls which accounted for sales of $3.8 million. Soft surface floor coverings, which were carried in 92.8% of these outlets, generated sales of $2.6 million, 69.5% of the total. Hard surface floor coverings were sold in 71.1% of the stores and produced sales of $0.7 million. Other large merchandise classifications which contributed over 1.0% of total sales in floor coverings stores were home textiles (2.1%) and furniture and bedding (1.6%).

Sales of Floor Coverings Stores by Major Merchandise Line, 1977
(Stores With Payrolls Only)

	Stores		Sales	
	No. Selling Line*	% of Total	Thous. $	% of Total
Floor coverings store sales, total	11,195	100.0%	$3,798,030	100.0%
Floor coverings	11,195	100.0%	3,387,543	89.2
Soft surface	10,385	92.8	2,639,652	69.5
Hard surface	7,957	71.1	747,891	19.7
Home textiles	2,129	19.0	79,764	2.1
Furniture and bedding	855	7.6	61,732	1.6
Kitchenware and home furnishings	449	4.0	14,469	0.4
Major household appliances	394	3.5	14,952	0.4
Other sales and non-merchandise receipts	--	--	239,570	6.3

*Each store is separately counted, regardless of whether or not it is part of a multi-unit operation.

Source: U.S. Bureau of the Census,
1977 Census of Retail Trade
Merchandise Line Sales RC 77-L.

The annual Management Report of the Retail Floorcoverings Institute (RFI) covers the financial operations of member floor coverings retailers. The 1979 report is an analysis of 196 survey respondents, 149 of whom provided complete financial information on their operations. Soft surface floor coverings account for 71% of sales in these retail outlets.

A composite average for respondents showed carpet sales in 1978 ahead of 1977 sales by 10.8%. Sales per square foot of selling area, at $229, were almost identical to 1977. According to the survey, gross margin per square foot of selling area ($71.45) and net profits per square foot of selling area ($4.21) were both significantly higher average figures than those achieved by carpet departments in either furniture or department stores.

RETAIL SALES BY STORE TYPE

Floor Coverings Specialty Stores

Average Merchandising & Operating Results of Floor Coverings Stores, 1978

	1978
Carpet sales, % change from last year (196)*	+ 10.8%
Net profits to net sales** (149)*	1.8
Net sales per sq. ft. of selling area** (149)*	$229.00
Gross margin per sq. ft. of selling area (149)*	$ 71.45
Net profits per sq. ft. of selling area (149)*	$ 4.21
Inventory investment per sq. ft. of selling area (149)*	$ 19.71
Current assets to current liabilities (times) (149)*	1.59
Ad expenditures (less co-op) as a % of net sales** (196)*	3.23%

*Numbers in parentheses refers to the number of reporting companies in each category.
**Net sales includes carpet installation fees.

Source: Retail Floor Covering Institute
1979 Management Report.

The RFI study also supplied information on residential and contract sales reported by member floor covering stores. Sales to home builders lagged in 1978, rising only 7.6% from 1977 in comparison to an increase of 10.8% in carpet sales storewide. Commercial contract customers spent an average $2,700 per transaction, 153% higher than the average sale in the floor coverings stores surveyed.

Retail Sales Profile of Residential & Contract Customers
In Floor Coverings Stores, 1978

	Total Store	Residential/ Retail	Builder Contract	Commercial Contract
Carpet sales, % change from last year	+10.8%	+11.7%	+7.6%	+10.7%
Carpet sales by customer type	100.0	65.9	19.1	15.0
Average no. of sq. yds. per transaction	99.7	52.3	127.5	272.7
Average price per sq. yd., incl. installation	$ 10.84	$ 12.70	$ 9.57	$ 10.01
Average transaction price	$1,080.75	$664.21	$1,220.18	$2,729.73

Among other significant findings in the RFI Management Report, member floor coverings stores reported that 84% of carpet sales were of a branded name and 16% were of private brands. Nearly 78% of these retailers received their carpet supply directly from the mill. Only 22.8% purchased their carpets from distributors. Smaller floor coverings stores were more apt to use distributors than their larger counterparts. Almost 34% of stores with annual sales under $500,000 reported buying carpets from distributors, but only 13.4% of retailers with total sales between $2 million and $5 million said they did so.

RETAIL SALES BY STORE TYPE

Floor Coverings Specialty Stores

Newspapers received an average of 53.4% of advertising expenditures (less co-op) from member stores. Radio placed second in ad dollar allotment with 15.9%, and TV accounted for 11.6% of ad expenditures. The yellow pages and other directories averaged 13.0% of ad expenditures.

When asked to identify their most pressing operating problems, participants pointed to their collection of accounts receivable as the number one problem. Slightly more than 83% mentioned this as either a minor problem or a major problem. Following closely behind as problems to retailers and the percentage of respondents who identified them as such were: managing cash flow (75.5%), obtaining adequate sales increases (73.6%), and the supervision of installers (73.5%).

HFD-Retailing Home Furnishings (January 15, 1979) covered the results of a study on the largest retail floor coverings firms in the U.S. in 1978. Of the 54 retailers listed, all with annual sales volumes of at least $5 million, the top ten companies accounted for 36.4%, or $350.5 million, or the total $703 million. Individual stores in the survey averaged $1.1 million in sales.

Of the total $703 million in sales reported for 1978, stores in the Midwest accounted for 49.9%. Eastern retail outlets surveyed had 25% of total sales, the West had 17.6% of sales, the South, 9.1%, and the Southwest, 7.3%.

The Top Retail Floor Coverings Specialists, 1978

	1978 Sales (Mil. $)	No. of Stores	Avg. Annual Sales Per Outlet* (Mil. $)
1. New York Carpet World Detroit, MI	$74**	65	$1.1
2. Carpetland, USA Munster, IN	70	31	2.3
3. Carpeteria Hollywood, CA	40	37	1.1
4. Allen Carpet Inwood, NY	37**	53	0.7
5. Kaufman Carpet Lodi, NJ	35	42	0.8
6. Miami Rug Co. Miami, FL	20	20	1.0
7. Beckwith-Evans Troy, MI	20	16	1.2
8. Carpet Fair Baltimore, MD	20	18	1.1
9. Abbey Carpet Sacramento, CA	17.5	56	0.3
10. Carpet Town Hollywood, CA	17**	29	0.6

*This figure is derived through the division of sales by the number of existing outlets.

**This figure is an HFD estimate, arrived at either with the assistance of the retailer or through industry sources.

RETAIL SALES BY STORE TYPE

Furniture/Home Furnishings Stores

Furniture stores, according to the 1977 census of retail trade, accounted for 15.0% of total reported sales of soft surface floor coverings handled by retail outlets. The number of furniture stores in operation showed an increase of 5.3% compared with 1972 census findings, and sales were up almost 36%. Furniture stores' total volume in 1979 reached $18.6 billion, 31.9% higher than in 1977.

Furniture Stores: Number of Stores & Total Sales, 1972, 1977-1979

	1979	1978	1977	1972	% Change 1977/1972
Number of stores	na	na	40,801	38,732	+ 5.3%
Total sales (bil. $)	$18.6	$16.2	$14.1	$10.4	35.6

Source: U.S. Bureau of the Census
Revised Monthly Retail Sales & Inventories; 1977 Census of Retail Trade, Establishment & Firm Size

Furniture stores operated the entire year in 1977 produced sales of $13.4 billion. There were 2,762 stores which had annual sales of $1 million or more and they accounted for 43.4% of the total sales amount.

No. of Furniture Stores by Sales Volume, 1977

	No. of Stores		Sales (Mil. $)	
	1977	% of Total	1977	% of Total
Furniture stores*	36,210	100.0%	$13,395.0	100.0%
$1 million & over	2,762	7.6	5,818.3	43.4
$100,000-$999,999	20,187	55.7	7,040.6	52.6
Under $100,000	13,261	36.6	536.2	4.0

*Only includes establishments operated the entire year.

Source: U.S. Bureau of the Census
1977 Census of Retail Trade
Establishment and Firm Size
RC77-S-1.

Soft surface floor coverings were sold in 45.3% of the 31,320 furniture stores with payrolls operating in 1977, and sales amounted to $628,987, or 4.6% of total furniture store volume. Hard surface floor coverings accounted for 0.5% of sales and were carried by 18.2% of the outlets. The following table shows the breakdown of sales by major merchandise line in U.S. furniture stores with payrolls.

RETAIL SALES BY STORE TYPE

Furniture/Home Furnishings Stores

Sales of Furniture Stores by Major Merchandise Line, 1977
(Stores With Payrolls Only)

	Stores		Sales	
	No. Selling Line*	% of Total	Thous. $	% of Total
Furniture store sales, total	31,320	100.0%	$13,623,582	100.0%
Floor coverings	15,014	47.9	703,062	5.2
Soft surface	14,180	45.3	628,987	4.6
Hard surface	5,691	18.2	74,075	0.5
Furniture and bedding	31,320	100.0	10,790,365	79.2
Major household appliances	10,689	34.1	726,031	5.3
Kitchenware and home furnishings	11,085	35.4	380,804	2.8
Televisions	8,191	26.1	376,540	2.8
Home textiles	6,786	21.7	241,400	1.8
Other sales and non-merchandise receipts	--	--	405,380	3.0

*Each store is separately counted, regardless of whether or not it is part of a multi-unit operation.

Source: U.S. Bureau of the Census,
1977 Census of Retail Trade
Merchandise Line Sales RC 77-L.

HFD-Retailing Home Furnishings (April 9, 1979) carried a report on a survey among the top 100 furniture retailers in the country on sales by merchandise classification. A total of 78 retailers responded. Floor coverings accounted for a typical 6.3% of total sales in these stores. A breakdown by sales group show variations ranging from a low of 4.0% of total sales (among the top 25 retailers) to a high of 6.7% of sales (among the 75th to 100th largest retailers).

Average Percent of Total Sales Contributed by Floor Coverings
In Furniture Stores, by Size of Store, 1978*

	All Stores	Top 25	26-50	51-75	75-100
Total sales	100.0%	100.0%	100.0%	100.0%	100.0%
Floor coverings	6.3	4.0	4.8	5.7	6.7

*The number of stores in each category who responded are: top 25 (18), 26-50 (17), 51-75 (20) and 76-100 (23).

RETAIL SALES BY STORE TYPE

Furniture/Home Furnishings Store

A study by the National Home Furnishings Association (NHFA) on their members' operating experiences in 1979 showed sales for the typical home furnishings retailer rose 8.7%, which according to the NHFA was about 2% above the inflation rate for the industry.

Almost 10% of total sales in home furnishings stores in the $500,000-$1 million total volume group came from soft surface floor coverings. This group also had the highest median sales to inventory figure (8.90 times) among the four sales groupings.

Soft Surface Floor Coverings Merchandising & Operating Results
In Home Furnishings Stores, 1979
(Median Results)

	% of Sales, Total Store	Gross Margin	Gross Margin Return on Investment	Sales to Inventory (Times)	% of Total Store Inventory
Firms with sales volume of:					
Under $500,000					
Floor coverings	6.78	30.44	1.03	2.44	1.50
All departments	100.0	40.00	1.36	3.43	100.00
$500,000-$1 million					
Floor coverings	9.53	35.26	2.76	8.90	4.74
All departments	100.0	40.70	1.49	3.76	100.00
$1 million-$3 million					
Floor coverings	7.61	34.39	1.59	4.70	4.98
All departments	100.00	41.20	1.70	3.97	100.00
Over $3 million*					
Floor coverings	6.21	35.00	1.89	5.68	6.76
All departments	100.00	41.90	2.05	4.72	100.00

*Does not include the large home furnishing chain stores.

Source: National Home Furnishings Association
1980 Report on Member Store Operating
Experiences in 1979.

Department Stores

Department stores' share of the reported soft surface floor coverings retail market in 1977 amounted to 19.4%, according to the 1977 census of retail trade.

There were a total of 8,807 department stores in operation in 1977 (including discount houses and mass merchandisers meeting the department store definition). This represents an increase of 14% over the 7,742 reported in the 1972 Census. Total sales rose 49% in the five year period, reaching $76.9 million in 1977. Currently annual volume is over the $89 billion rate.

RETAIL SALES BY STORE TYPE

Department Stores

Department Stores: Number of Stores and Total Sales, 1972, 1977-1979

	1979	1978	1977	1972
Number of stores	na	na	8,807	7,742
Sales (bil. $)	$89.1	$81.8	$76.9	$51.5

Source: U.S. Bureau of the Census
Revised Monthly Retail Sales;
1977 Census of Retail Trade
Establishment & Firm Size.

Soft surface floor coverings accounted for 1.1% of total department store sales in 1977 and were sold in 68.8% of these stores, according to the census of retail trade. Soft surface represented 5.8% of total home furnishings sales in department stores. Only 29.5% of department stores carried hard surface floor coverings and their sales accounted for 0.1% of total store volume.

Sales of Home Furnishings in Department Stores
By Major Merchandise Line, 1977
(Stores With Payrolls Only)

	Stores		Sales		
	No. Selling Line*	% of Total	Thous. $	% of Total	% of Home Furn. Sales
Department store sales, total**	8,807	100.0%	$76,909,452	100.0%	
Total dept. store home furnishings sales	8,807	100.0	14,052,544	18.3	100.0%
Floor coverings	6,281	71.4	895,868	1.2	6.4
Soft surface	6,064	68.8	813,935	1.1	5.8
Hard surface	2,598	29.5	81,933	0.1	0.6
Home textiles	8,807	100.0	3,912,809	5.1	27.8
Kitchenware and home furnishings	8,631	98.0	3,470,264	4.5	24.7
Major household appliances	5,861	66.5	3,181,219	4.1	22.6
Furniture and bedding	6,736	76.5	2,598,384	3.4	18.5
All other sales and receipts	8,807	100.0	62,856,908	81.7	

*Each store location is separately counted, regardless of whether or not it is part of a multi-unit operation.

**Includes all outlets meeting the official Standard Industrial Classification (SIC) definition of a department store, regardless of type of operation (discounter or traditional). This category includes catalog order-desk sales, but not orders entirely by mail through catalog headquarters, which are included in mail order houses.

Source: U.S. Bureau of the Census
1977 Census of Retail Trade
Merchandise Line Sales RC 77-L.

RETAIL SALES BY STORE TYPE

Department Stores

Soft surface floor coverings departmental operating results are compiled annually by the National Retail Merchants Association. Findings for 1979 are summarized below.

Selected Median (Typical) 1979 Merchandising & Operating Results
In Department Stores With Total Sales Over $1 Million

	Total Upstairs Store (143)*	Floor Coverings** (92)*	Broadloom (Incl. Paddings) (32)*	Area Rugs (Incl. Room Size) (35)*
Net sales, % change from last year	+5.5%	+2.7	-0,4%	+8.5%
Net sales, % of total store	89.2	1.0	0.8	0.3
Net sales, % of merchandise division	--	11.8	7.8	3.5
$ sales per sq. ft. of selling space (main or largest selling unit)	$91.6	$ 2.5	$75.1	$63.9
Cumulative markon, %	48.0%	41.8%	39.7%	48.9%
Markdowns, % of net retail sales (incl. employee discounts)	13.2	7.1	7.3	7.1
Gross margin, % of net retail sales (incl. cash discounts)	42.2	37.2	36.1	48.6
Number of stock turns (times)	3.1	2.2	3.8	1.4
Sales promotion costs, % of sales	3.0%	3.8%	4.2%	3.6%

*Numbers in parentheses refers to the number of reporting firms in that category.
**Includes both hard and soft surface floor coverings.

Source: National Retail Merchants Association, "Merchandising & Operating Results of 1979," 1980 Edition.

Seasonality in Department Store Sales of Floor Coverings
Percent of Year's Sales by Month - Five Year Average

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Home furnishings, total	6.8%	6.8%	7.5%	7.2%	7.0%	7.8%	7.6%	7.9%	8.4%	9.2%	10.3%	12.5%	100.0%
Domestic floor coverings	8.3	7.6	8.2	7.1	7.6	6.4	6.7	7.8	9.3	11.6	11.5	7.9	100.0
Carpets & rugs	7.5	7.9	7.9	7.1	7.5	6.8	6.7	8.2	8.8	11.5	12.3	7.8	100.0

Source: Data are five-year averages computed by the Newspaper Advertising Bureau (1961-1965) (latest available).

RETAIL ADVERTISING

Percent of Years' Total Ad Linage Used Each Month
On Broadloom Carpeting, 1979

Month	Broadloom Carpeting
January	7.6%
February	8.0
March	9.0
April	8.5
May	8.4
June	7.8
July	8.2
August	9.0
September	8.8
October	9.9
November	9.2
December	5.6

Source: The Advertising Checking Bureau-Neustatdt Reports Division, covering retail newspaper linage in all newspapers in seven cities: Chicago, Dallas, Cincinnati, Philadelphia, Cleveland, Los Angeles & Washington, D.C.

CONSUMER BUYING HABITS

Data on consumer purchases of specified types of floor coverings, shown on the following pages, have been compiled by the National Panel Diary (NPD) Textile and Apparel Market Index, a specialized service of NPD Research, Inc., of Floral Park, N.Y. Findings are based on reports in an on-going monthly diary survey which tracks purchases reported by a panel of 6,500 nationally-representative U.S. families. (Note that "singles" with their own households are not included). Data shown for families reporting floor coverings purchases are summarized below.

Room-Size Carpets

The NPD panel reported that almost 65% of room-size carpets were purchased at sale price in 1979 in contrast to only 45.8% the previous year.

Percent of Purchases by Store Type

	Units		Dollars	
	1979	1978	1979	1978
Department stores	6.7%	9.1%	4.5%	11.7%
Chains (Sears, Penneys, Wards)	34.9	32.8	32.5	23.4
Discount stores (incl. K-mart)	17.8	18.8	12.5	14.7
All other outlets	34.4	34.8	41.5	45.9
Not reported	6.3	4.6	8.9	4.2

CONSUMER BUYING HABITS

Percent of Purchases by Month

Units:	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
1979	4.3%	5.9%	6.3%	10.7%	6.0%	10.8%	12.2%	11.1%	6.1%	10.8%	6.7%	9.1%	100.0%
1978	6.2	12.0	13.1	11.3	6.4	11.1	6.1	7.4	5.2	6.5	8.1	6.8	100.0
Dollars:													
1979	3.8	6.1	7.8	12.8	4.7	11.2	10.9	7.5	7.2	9.7	10.9	7.3	100.0
1978	4.4	14.7	9.8	12.4	5.2	13.7	7.7	6.9	4.6	5.4	7.5	8.0	100.0

Wall-to-Wall Carpeting

Slightly over 54% of wall-to-wall carpeting was purchased at sale price in 1979 while 38% was bought at regular price, according to NPD.

Percent of Purchases by Store Type

	Units		Dollars	
	1979	1978	1979	1978
Department stores	5.5%	7.5%	6.6%	4.9%
Chains (Sears, Penneys, Wards)	6.3	12.3	5.1	12.8
Discount stores (incl. K-mart)	3.9	2.6	1.4	2.6
All other outlets	70.5	65.3	69.7	70.4
Not reported	13.8	12.2	17.3	9.4

Percent of Purchases by Month

Units:	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
1979	9.5%	7.7%	8.0%	7.0%	8.8%	7.8%	6.7%	6.8%	6.6%	6.2%	15.7%	9.3%	100.0%
1978	6.4	6.4	9.7	9.6	8.1	7.3	6.4	6.9	12.5	7.9	11.7	7.1	100.0
Dollars:													
1979	4.6	3.6	3.9	3.2	9.4	10.6	7.6	7.5	7.7	7.8	21.7	12.4	100.0
1978	4.4	3.8	6.2	17.1	4.8	10.2	7.5	8.8	19.9	5.3	7.5	4.5	100.0

Area Rugs

In 1979, 51.6% of reported purchases of area rugs were at less than the regular price. This percentage was lower than the 55.9% bought at sale price in 1978. Reported purchases of area rugs at regular price increased to 40.7% compared with 34.3% in 1978.

Percent of Purchases by Store Type

	Units		Dollars	
	1979	1978	1979	1978
Department stores	20.1%	16.4%	31.1%	26.2%
Chains (Sears, Penneys, Wards)	19.7	15.0	26.8	25.5
Discount stores (incl. K-mart)	37.9	33.4	9.5	12.7
Variety stores	6.0	4.7	1.7	2.6
All other outlets	15.1	28.4	27.5	30.6
Not reported	1.4	2.3	3.3	2.3

CONSUMER BUYING HABITS

Area Rugs

Percent of Purchases by Month

Units:	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
1979	9.2%	9.9%	12.5%	10.6%	3.3%	8.5%	7.2%	4.2%	7.8%	4.7%	12.6%	9.4%	100.0%
1978	13.5	14.8	8.7	5.5	17.5	5.6	4.9	2.2	5.9	7.3	8.9	5.2	100.0
Dollars:													
1979	3.4	10.7	5.5	11.4	8.8	9.4	5.2	2.2	7.7	4.1	18.9	12.6	100.0
1978	3.8	4.6	6.4	9.0	8.0	12.0	10.0	5.2	6.2	14.3	11.4	9.1	100.0

A panel of 500 women, representative of all Better Homes & Gardens subscribers, were asked various questions about their purchases of carpets and rugs in a 1979 study conducted by Better Homes & Gardens.

Four out of ten panel members said they have purchased carpets or rugs within the past two years. Only 10.2% of these purchasers considered a brand name to be "very important" in their selection, although an additional 49.7% considered a brand name to be "somewhat important."

These purchasers, when asked to indicate the important factors in their buying decision, named the surface appearance and color of a carpet or rug as the most important factor. Other important considerations taken into account prior to purchase were durability, soil resistance/cleanability and price. The least important considerations were identified as the reputation of the manufacturer, anti-static properties of the carpet or rug and the salesman's recommendation.

The type of fiber mentioned most frequently by these carpet/rug purchasers was nylon, which garnered 41.2% of fiber mentions. Acrylic was the next most popular fiber type (31.0% of all mentions).

Type of Fiber Chosen on Carpet/Rug Purchase

	% of Total
Total (187 respondents)*	
Wool	8.0%
Acrylic	31.0
Modacrylic	2.7
Nylon	41.2
Polyester	12.8
Polypropylene olefin	4.8
No answer	5.3

*Total adds to more than 100% due to multiple responses.

Respondents were also asked which factors caused them the most difficulty in deciding on a carpet or rug. Color was a difficult decision for 29.9% of respondents. Knowing how durable a carpet would be was a difficult factor for 25.1% of these purchasers.

Difficult Factors About Choosing Carpets or Rugs

	% of Total
Total (187 respondents)*	
Color	29.9%
Knowing how durable the carpet would be	28.1
Deciding which is the best quality	24.1
Deciding on type (plush, shag, etc.)	21.4
Cost	18.7
Fiber knowledge	15.0
Other	2.7

*Total adds to more than 100% due to multiple responses.

A study conducted in October-November 1979 by Scarborough Research Corp., New York, on behalf of House & Garden magazine sought to develop information on home furnishings purchases by a typical House & Garden subscriber household. From a representative sample of 10,000 House & Garden subscribers, 4,477 readers replied. Carpeting and rugs were purchased by 43% of these respondent households during the year prior to the survey, compared with 13% of all U.S. households.

Department stores were cited as the place of purchase for 31% of respondents who bought carpets or rugs. Furniture stores were selected as the purchase place by 18% of respondents. Another 13% bought their carpets or rugs in discount stores while 41% picked other types of stores (including floor coverings dealers) as the purchase site. (Due to multiple responses, the percentages do not add to 100%.)

Subscriber households who bought carpets or rugs in the past year spent an average of $999 in contrast with the average $432 spent by all U.S. households who bought these items.

Carpet & Rug Expenditures by Price Points

	% of Total
Total respondents purchasing carpets or rugs	100%
Less than $100	10
$100-$500	29
$500-$1,000	19
$1,000-$1,500	16
$1,500 & over	26

In February 1979, members of Seventeen magazine's Consumer Panel were asked about their home furnishings purchases. Questionnaires were received from 1,009 female respondents. Of the 843 respondents with their own room at home, 66.3% had wall-to-wall carpeting, 17.5% had scatter rugs and 12.0% had room size rugs.

(continued)

CONSUMER BUYING HABITS

Over half the girls with rooms at home plan to decorate these rooms in the near future, 40% within the next two years. Nearly 24% of girls expecting to decorate said they would buy wall-to-wall carpeting. Room size rugs were expected to be purchased by 5.5% of the girls and an additional 5.5% will buy scatter rugs.

In the same Seventeen study, engaged girls and those planning to become engaged within a year were asked which home furnishings items they expect to purchase. Of the approximately 157 girls in this category, 43.9% stated they expect to purchase wall-to-wall carpeting.

FAIRCHILD FACT FILES AVAILABLE FOR 1980

CONSUMER MARKET DEVELOPMENTS: Summarizes key economic trends and indicators, particularly those having a direct relationship to the consumer market for durable and nondurable goods. A wide variety of sources are drawn on to present an overview of economic developments and market trends, as well as consumer market dynamics, including trends by age group, educational and income levels, buying patterns and outlook.

THE CUSTOMER SPEAKS—1980: Supplementing the comprehensive reports on fall/winter and spring/summer wardrobes (published in THE CUSTOMER SPEAKS, 1979 FACT FILE), this report covers details on buying practices in relation to specific types of women's wear, as well as information on reactions to price increases, attitudes toward stores and sales help, views regarding quality levels in specific types of apparel and more. Findings are based on a nationwide survey among a representative sample of women and are presented in terms of significant demographic characteristics. ($15.00)

THE CUSTOMER SPEAKS (A FACT FILE SPECIAL EDITION): Complete findings of two nationwide surveys conducted for Women's Wear Daily among a cross-section of women on their fall/winter and spring/summer wardrobes, their new apparel acquisitions, and buying plans for next season. Also includes information on buying habits, place of purchase, activities, attitudes, and outlook. Data is analyzed in terms of demographic characteristics, employment status, fashion stance, and degree of social activity. (204 pages, $20.00)

DEPARTMENT STORE SALES (December): Covers the latest available annual sales of department stores throughout the country listed by buying headquarter location. Includes data on number of outlets covered in reported sales totals, as well as information on sales for many branch and main stores. Some leading specialty operations are also included in the listing by location. Other listings: department store operations with sales of $50 million or more reported in order of volume, major conglomerates with general merchandise store or apparel store divisions, and department stores operated by major department store corporations.

FASHION ACCESSORIES: Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

HOME ELECTRONICS: A statistical summary of the consumer electronics market. Product classifications include home entertainment and related products (television sets, radios, stereos, audio and video systems, video games, etc.), as well as home security and fire protection devices and calculators. Data presented at the manufacturer, retailer, and consumer levels.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer buying patterns are also covered.

HOUSEHOLD FURNITURE AND BEDDING: Provides industry-wide data on manufacturers' shipments of furniture and bedding (mattresses and bedsprings) and number, size and location of manufacturing firms as well as sales of leading manufacturers. Retail information includes sales in furniture and department stores, popular furniture styles and materials, and on consumer buying habits.

INFANTS', TODDLERS', GIRLS', AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on operating ratios in department and specialty stores, seasonal patterns in advertising, more. Information is also presented on consumer spending and buying preferences.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MEN'S CLOTHING, TAILORED SPORTSWEAR AND RAINWEAR: Manufacturer level profiled by production, value of shipments, employment, size of firms, more. Imports from key foreign sources by unit and dollar value covered, and data is also presented on retail sales and merchandising.

MEN'S FURNISHINGS AND CAREER/WORK WEAR: Includes information on number of manufacturers, production and shipment figures, geographical distribution, size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, and advertising patterns.

MEN'S SPORTSWEAR, CASUAL WEAR, JEANS AND ACTIVE WEAR: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels and fashion jeans, are included.

MEN'S, WOMEN'S, AND CHILDREN'S BODYWEAR AND LEGWEAR/HOSIERY: A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipment, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

MEN'S, WOMEN'S AND CHILDREN'S FOOTWEAR: Findings in a 1980 survey on consumer purchases of footwear are an important new feature of this FACT FILE. Also included are data on major trends in the industry in relation to imports, domestic production and shipments, as well as developments at the retail level.

THE TEXTILE-APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics, as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills. Also: exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the industry covering production for both the female and male market. Includes latest available industry statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditure data, buying habits and usage of various product types are also highlighted, as well as data on sales by outlet type, and advertising expenditures by major producers.

WOMEN'S COATS, SUITS, RAINWEAR AND FURS: Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

WOMEN'S DRESSES (January 1981): Statistics on the women's dress industry, including unit-price and dozen-price dresses, trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

WOMEN'S INNER FASHIONS: NIGHTWEAR AND DAYWEAR: Data on production and shipments, tracing market shifts in response to fashion changes. Also: imports, retail trends and merchandising ratios, and data on consumer buying habits.

WOMEN'S SPORTSWEAR, SEPARATES, JEANS AND ACTIVE WEAR: A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer label.

For orders and further information, please write to:

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7 East 12th Street
New York, New York 10003

Titles with months in parentheses will be published in the months listed.